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ABSTRACT

Applications of the qualitative approach in the evaluation of special education and second language programs are addressed in this paper. Qualitative data are recommended for providing detailed descriptions of specific program elements, and can be obtained through interviews, observations, case studies, and ethnographic studies. Six evaluation studies carried out in the San Diego (California) Public Schools which illustrate the successful use of qualitative evaluation methods are described. The examples include: (1) observation used to confirm whether certain program elements were implemented; (2) an ethnographic study used to identify common features of effective special education classrooms; (3) seven student case studies developed to describe in depth the characteristics of program participants; (4) open-ended interviews used as a preliminary step in developing a needs assessment; and (5) observations and interviews used to investigate discrepant quantitative data and findings. (Author/GDC)

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"Qualitative Approaches to Program Evaluation: Some Applications"

California Educational Research Association
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November 14, 1986

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The application of the qualitative approach in the evaluation of special education and second language programs is addressed in this paper. Qualitative data provide detailed description of specific program elements and can be obtained through interviews, observations, case studies, and ethnographic studies. Examples drawn from evaluation studies carried out by the authors are presented to illustrate the successful use of qualitative methods and include the following:

A. observations used to confirm whether certain program elements were being implemented;

B. ethnographic study conducted to identify common features of effective special education classrooms;

C. case studies used to describe in depth the characteristics of clientele in newly implemented program;

D. open-ended interviews used as a preliminary step in the development of a needs assessment; and,

E. observations and interviews to investigate, in depth, discrepant quantitative data and findings.

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Qualitative Approaches to Program Evaluation: Some Applications

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The application of the qualitative approach in evaluating educational programs such as special education, Chapter 2, and second language is addressed in this paper. Evaluation research is designed to give information about the quality of educational programs to decision-makers. The evaluation findings can contribute to decisions made about program development, modification, or continuation. Qualitative evaluation methods focus on indepth study of contemporary phenomenon within some real-life context through the use of case studies, participant-observation, interviews, ethnographic, or other naturalistic inquiry techniques. The exploratory and open-ended nature of qualitative techniques permit the evaluator to broaden the study's information base and strengthen the findings and recommendations that can be provided to decision-makers. Incorporating qualitative methods into the design statement can enhance a program evaluation in the following ways:

° generate theory grounded in the data as they occur in the naturalistic setting;

° handle subjective data which allow the evaluator to understand and record people's thoughts and perceptions; and,

° understand the whole (gestalt) of the program or concern that is being evaluated.

Examples drawn from evaluation research using qualitative methods such as participant-observation; case studies; open-ended interviews; and ethnographic techniques are presented. The research is summarized specific to purpose of the evaluation, procedures, and key findings. A brief discussion is provided about each evaluation study.

A. **Evaluation Report on the Resource Specialist Supplemental Assistance Program in Evaluation of the Master Plan for Special Education. Evaluation Department Report No. 416, San Diego City Schools, November 30, 1985.**

Purpose: assess effectiveness of a pilot resource specialist supplementary assistance program which allowed resource specialists to serve students who did not meet eligibility criteria for special education but were weak in basic skills.

Procedures: ethnographic approach with 25 observations of teacher-child interaction conducted during basic skills instruction within the resource specialist program and in the regular classroom. Also, openended interviews were carried out with resource specialists, regular education teachers, and children at the three elementary schools.

Key Findings: children who were at the bottom of their reading groups and unable to keep up at the time they began participating in the supplemental assistance program were "on a par" with their classmates at the end of the school year. The number of teacher initiated interactions during reading instruction in the resource specialist program and in the regular classroom was nearly the same. However, teacher follow up to student errors was twice as likely to occur in the resource program than in the regular classroom. While the resource specialists were well aware of the program design and goals, regular education teachers were less acquainted with how to make use of the program.

Discussion: use of the ethnographic method permitted the evaluator to identify and investigate the meaningful characteristics of the supplementary assistance program. A "task/response" coding scheme for measuring teacher-child interaction in special education and mainstreaming settings was developed based on these data.

B. **Description of the District's Special Education Programs. Evaluation Department Report No. 429A, San Diego City Schools, June 24, 1986.**

Purpose: describe special education programs and services offered by the district. The report was prepared as a supplement to an independent audit of the Special Education Department.

Procedures: single case studies of special education students. The case studies were based on the following sources of evidence: psychological reports, teacher observations, IEP records, and parent interviews.

Key Findings: descriptive case studies of seven special education students were prepared to illustrate the full range of special education programs and services that were being provided.

Discussion: the single case study design effectively communicated information about the program's clientele and range of available services to audiences who were unfamiliar with special education.

C. **Evaluation of the Special Education Curriculum Communication Process in Annual Evaluation of the District's Special Education Program. Evaluation Department Report No. 434, San Diego City Schools, July 31, 1986.**

Purpose: determine effectiveness of a communication process established to maintain routine interaction between special education and regular education staffs about the district's curricula.

Procedures: a survey with structured questions requiring a Likert-type scale also included openended questions to solicit respondents' concerns abut the communication process. Content analysis of the respondents' written concerns along with data from follow-up interviews permitted the evaluator to categorize recurrent themes and identify key problem areas.

Key Findings: the process was rated overall to be reasonably effective with the following problem areas identified through the content analysis: (1) need for greater involvement at "grass roots" levels of classroom teachers, resource teachers, and parents; (2) better articulation of the communication process with the general education program; (3) more specificity and direction in the goals of the curriculum communication process; and, (4) more inclusion of low incidence handicapped program staff.

Discussion: building in the openended format to a structured survey allowed the evaluator to identify problem areas as they emerged from the respondents' comments. The data were obtained from a large number (n=105) of respondents that could not have been interviewed in such an effective manner otherwise.

D. **Annual Evaluation of the Basic Skills Supplementary Assistance Program. Evaluation Department Report No. 449, San Diego City Schools, November 4, 1986.**

Purpose: evaluate implementation of the Basic Skills Supplementary Assistance Program in which direct instruction, that was supplementary to the core classroom program, was available to all students in all schools.

Procedures: in addition to evaluating the referrals and students served districtwide, a "field study" using interviews with the basic skills teachers and participant-observation of their instructional sessions was carried out in eight elementary schools. Twelve teachers were interviewed and 57 sessions were observed. The data as they emerged from the naturalistic setting were coded and categorized specific to location of the supplementary instruction sessions, teaching strategies, instructional materials used to teach reading, mathematics, and language, background information, referral process, defining and measuring mastery, communication with classroom teachers, and areas of effective/ineffective implementation.

Key Findings: the program was found to be successfully implemented in the eight elementary schools. Secondary findings from the field study indicated that basic skills teachers were more often than not assigned to inadequate working facilities having poor lighting, high noise levels, or were unheated; teachers were likely to return to the same site year after year assuring continuity in the site program; all site programs had long waiting lists so that the basic skills teachers were unable to work with a student when the need for assistance was greatest; and, implementation of the program was quite uniform in the eight elementary schools that were observed.

Discussion: the "field study" which allowed for a close-up view of how the program was actually being implemented in the elementary schools permitted the evaluator to identify and investigate the total program.

E. **Evaluation Report on the Second Language Education Program. Evaluation Department Report No. 413, San Diego City Schools, January 7, 1986.**

Purpose: to assess the extent of implementation of the Second Language Education Program which provides content area instruction in both the students' primary language and English.

Procedure: observations were conducted in 11 elementary, 4 middle, and 6 senior high schools. A total of approximately fifty classrooms were visited at least twice during the school year. The instrument used for the observations was developed by the evaluator with the help of program resource teachers.

Key Findings: in general, sites visited had implemented the program in accordance with guidelines set forth by the Second Language Education Department. In particular, it was found that teaching strategies varied according to the setting as teachers improvised to meet their particular needs, but that basically the program was carried out as designed. Other elements such as identification, assessment, placement, testing, and reclassification of students were found to be in congruence with established guidelines.

Discussion: we felt it was essential to determine whether the program was being implemented as described in the district plan, and the extent to which this was happening. It was decided that by observing what was actually happening in the classroom, we could find the answer to the two questions posed above.

The first step we took was to develop an instrument that would help us gather the information we thought to be necessary to determine the type of program in place. It was therefore necessary to closely examine documents available which described the program the district office had planned.

After having peers review the observation instrument, we then went to the classrooms to try it out. Thus armed, we conducted several observations, made some warranted changes in the instrument, and went back to find the answer to the two major questions we had asked.

We found that not only was there enough information to answer our questions, but that so much was taking place in those classrooms which went beyond what the original plan had called for, that the task became one of accurately describing what was actually occurring.

Thus, the observations yielded information which helped to determine whether the program was implemented as intended, the extent to which this was taking place, and most interestingly, in describing the ways in which teachers had used their imagination to adapt it to their particular needs.

F. **Evaluation Report on Second Language Education Program. Evaluation Department Report No. 413, San Diego City Schools, January 7, 1986.**

Purpose: to determine the degree to which administrators were familiar with current second language education (bilingual education) legislation. If the findings warranted, the Second Language Department would hold inservice sessions to disseminate pertinent information.

Procedures: principals and other administrators charged with the coordination of second language education programs were selected to be interviewed. The interviews were conducted using an openended format which was designed to allow the respondent to give indepth responses.

Key Findings: the majority of principals delegated the responsibility of supervising/coordinating these programs either to the vice principal or to a resource teacher, and were generally unfamiliar with the law related to their implementation. It was decided that rather than scheduling inservice sessions to enhance knowledge about the law in question, a comprehensive, simple explanation of it would be mailed to the principals affected.

Discussion: structured interviews have been used for several purposes including the gathering of people's opinions about certain issues, their reaction to some event, or whether they prefer this or that product.

We wanted to find out what the extent of knowledge school site administrators had regarding certain legislation which directly affected their schools. Our purpose was not to find how many knew and how many did not, but rather to establish whether there was a need to design a workshop/inservice during which this law could be discussed. In addition, if indeed there was a need to meet, we wanted to find out which areas of the law the session should focus on.

It was important to develop an instrument to determine what the interviewee knew about the law in question, and decide whether there was a need for a future inservice session. Once we established the objectives for the interview, developing the interview questionnaire was not difficult.

The questions allowed for the interviewee to respond as freely as necessary. It was felt that such openess was necessary since the objective was to find out not only whether the respondent knew about the law, but the degree of familiarity with it as well.

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